

Middle School Initiative

**PART I
COVER SHEET**

CAP 4 SEMESTER 1 WEEK 12

COURSE: Administrative Officer Leadership Laboratory, Achievement 10

LESSON TITLE: Staff Study Report

LENGTH OF LESSON: 50 Minutes

METHOD: Informal Lecture - Discussion

REFERENCE(S):

1. *Leadership: 2000 and Beyond*, Volume II, Chapter 9
2. AFH 33-337, *Tongue and Quill*, Pages 187 –195, 30 Jun 97
3. CAPR 10-1, *Preparing and Processing Correspondence*, 1 Oct 96

AUDIO/VISUAL AIDS/HANDOUTS/ACTIVITY MATERIAL(S):

1. Overhead Projector
2. Transparencies
3. Handout 1- Staff Study Report Format

COGNITIVE OBJECTIVE: The objective of this lesson is for each cadet to:

1. Understand the purpose of a staff study report.
2. Become acquainted with the generic format of a staff study report.

COGNITIVE SAMPLES OF BEHAVIOR: Each cadet should become knowledgeable in the use of a staff study report.

AFFECTIVE OBJECTIVE: N/A

AFFECTIVE SAMPLES OF BEHAVIOR: N/A

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PART II TEACHING PLAN

Introduction

ATTENTION: Welcome back to your next class in leadership development.

MOTIVATION: George John Whyte-Melville, an English philosopher said, "*Education should be as gradual as the moonrise, perceptual not in progress but in result.*" His implication is that the product we eventually produce is what we should look at and not the process of doing so.

TRANSITION: Last period we discussed some problem solving procedures that may or may not be used in all problem-solving cases. During this period we will continue to look at these procedures and develop them a little further so that they can be presented in a written format.

Body

MP 1 Just what is a staff study? The staff study, as a thought process, is far more important than what you call it or what precise format you follow to write up your problem solution. There is no simple formula for designing reports, and there are probably as many different types of reports as there are situations. By outlining and discussing the staff study, however, you will understand the essential elements of any report that calls for a problem-solution explanation; i.e., various forms of verbal reports, letters, estimates of the situation, operational plans and orders, and the staff study itself.

Other than during our next class, you may never write up a problem solution in the staff study format. However, if you understand and can apply the essential elements of problem analysis, you will be prepared for any type of staff communication. By the time you finish the staff study report, you will have no deep affection for this system of communication. This communication package is one of the most demanding processes outside of being a member of the Joint Chiefs of Staff in the Pentagon. So why should we discuss this format at all? Look at it this way - if you climbed Mount Everest, in the Himalayas, strolling through the foothills of the Appalachians should pose no threat.

Complete staff work has three results. First, it protects your supervisor or commander from illogical ideas, incomplete or wordy written reports and vague oral reports. Second, it frees your superior to do work at the staff or command level. Third, it gives staff officers a hearing for new ideas.

MP 2 We have spent quite some time on the processes of decision-making and problem solving, now let's take a look at the process of putting all this work down in black and white.

Before writing your staff study report, you must mentally solve it. Isn't that what we did in the last hour? Here we have the same process being done, but we are going to formalize it by writing it out and presenting it for consideration.

The first thing before setting pen to paper is to analyze your audience. At what level of education will you write this report? What is the recipients' knowledge level regarding the subject to be written about? What operational constraints face you that may affect the problem-solving process?

TRANSPARENCY LL10.3.1 - Staff Study Report

This slide shows a generic format of a staff study report. As you can see, the format contains the same elements of problem solving as in the last hour. In your problem-solving class, you had the opportunity of developing the problem statement so that it was clearly stated. In writing your problem statement, you must use that same rational.

Next come the factors that have a bearing on the problem. These are the facts gleaned from your information/data gathering process. Next are your assumptions. They are necessary because they are always there to be considered. Assumptions must be supported by some valid conclusions, even if the assumptions are not completely true. Logic plays a large part in formulating and supporting your assumptions. Criteria establish the standards, requirements, or limitations that are used to test all possible solutions. Finally, in this area are definitions. There may be some terms used in your discussion that may need clarification and here is the place to do it.

The next major area is the discussion. This is where you really excel in showing your logical approach to solving the problem. It is the meat of your argument. It is where you convince your audience that the conclusion and action recommended are the things to consider and act upon.

Your conclusion should show that your solution is a workable and complete resolvment of the problem. The conclusion is nothing more than a brief statement of the best possible solution or solutions. Do not introduce any new material, or arguments, here.

Finally, in the text area is the recommended action. This is telling your audience what action is necessary. The number of recommendations is not important; just be sure you have complete staff work to justify your recommendations. Word the recommendation(s) so your superior need only sign for the action.

The end of your report will include your signature element and show any supporting attachments included with the report. There we have it. A finished staff study report on a very complex problem.

MP 3 Completed staff work results in a well-written staff study report. You have looked at the problem, considered all the variables, and provided a solution for action. All that is necessary is for your superior is to approve or disapprove your work.

Any impulse to ask your superior what to do should be stifled. You have been tasked to provide the solution. You may inquire at any point in the problem-solving procedure if you need to find out if you are on the right track. This coordination with your superior often will save many hours of frustrating work if you have a tendency to veer off in the wrong direction.

Remember the final test of completed staff work: If you were the boss, would you be willing to stake your reputation on this problem-solving report? If the answer is no, then go back to the starting point and reconsider your actions.

Conclusion

SUMMARY: What have we covered this period? We have looked at the resolution of a problem. We have taken a problem to task, analyzed it, found possible solutions, made our recommendations based on sound decisions on what we believe is right for the situation, and presented the final work to our supervisor for implementation. Our complete staff work has satisfied the ones above us and that makes us happy - right?

REMOTIVATION: You have finished the briefing on the staff study report . . .or everything you were afraid someone would eventually tell you about problem-solution reporting.

CLOSURE: To close out our period today, be reminded that next week you will actually be required to do a staff study report based on a known problem. Re-read all pertinent material on decision-making, problem solving and the material covered in this period.

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**PART III
LESSON REVIEW**

LESSON OBJECTIVE(S): The purpose of this lesson was to acquaint the cadets with the purpose and use of a staff study report.

LESSON QUESTIONS: Completion of the chapter review exercise satisfies this requirement.